RedHorse CRM

User's Manual

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Introduction

Welcome to RedHorse CRM

Welcome to RedHorse CRM! RedHorse CRM is the perfect contact manager for individuals and teams, specifically designed for small and mid-sized organizations. It doesn't need expensive additional hardware and software to operate. Install it on your network server and workstations, set it up to match your company, and you are ready to go.

RedHorse CRM provides your company with a powerful, comprehensive, integrated, automated solution to managing customer relationships. The RedHorse CRM solution offers effective tools to develop contacts, conduct activities, and track progress—tools that are available for both the individual and the workgroup. And with RedHorse CRM's remote desktop features, users working remotely can stay current with the main company database.

Who should read this Manual?

Only those folks who absolutely have to, will read this manual. We don't expect it to ever reach the Top 10 list. Anybody's top 10. Technical manuals are usually dead boring. We don't expect this to be the most riveting of books that you read, but we do hope to lighten it a bit.

It's a statistical fact that only 6% of the population wants to (actually has to) store things in an orderly fashion. So why enter information into a computer? Because at some time, you will want, even need, that information. RedHorse CRM can help you two ways: Make storage easy – almost automatic, and make retrieval easy.

You don't have to be a power user of computers. If you are someone who uses a computer in their work, and generally know how to turn one on, you have the right skills. If you know where menus are usually located, what a Microsoft® program such as Outlook® looks like and generally how it reacts to things that you do, you are ahead of the game.

You will find inside the main features in RedHorse CRM and RedHorse CRM Express, and we give you answers to basic questions about how RedHorse CRM works. If you can't find what you are looking for in this manual, there are two other sources that may be able to show you what you want to know: the Help files under the **Help** menu, just under the RedHorse CRM Title Bar, and online help http://www.redhorsesystems.com/ in the **Support** or **Forum** sections. If you are truly desperate, call your Administrator. They have application notes that you probably will never want to read, the *RedHorse CRM Administrator Manual*. When they get stuck, they usually call their VAR (Value Added Reseller), you know, the folks that installed the program at your company.

We may at times go a little deeper into the technology than meets your comfort level. For that we apologize, but even if you don't follow the tech, you should be able to use most of the program's capabilities to make your life easier. Some of it will get more familiar with use. Feel assured that you cannot hurt the program even if you do lose some data in your testing. The best way to read this manual is at your workstation with RedHorse CRM on the screen.

Company many not be an accurate description of your organization. We apologize in advance for using this shorthand way throughout the manual of referring to the several types of organization who may be using the program. It doesn't matter if your company produces products or delivers services.

There are a lot of strange words in this manual, and some familiar words with strange meanings. When you come across them, and want to know what they actually mean, look in the **Glossary** in the back of the manual. We hope we've covered them all.

Contact RedHorse Systems

The true fount of knowledge for all things in RedHorse CRM is the company, RedHorse Systems (RHS). Without their assistance, this manual would still be a wish. Any errors or omissions are ours.

RedHorse Systems, Inc.
Phone: (888) 831-9012
Fax: (888) 831-9012
Email: support@redhorsesystems.com

RedHorse CRM Overview

Introduction

RedHorse CRM puts all necessary contact information at your fingertips. In fact, it puts that information at the fingertips of all the users who are granted access to it. No more emailing others in your organization to keep them informed. They can look themselves, when it is convenient for them. RedHorse CRM not only allows you to track the contacts, but also their histories and pending activities as well. Without a lot of time-consuming communication, customer service, sales, management, and accounting teams can find out about prospects, clients, and vendors. RedHorse CRM integrates each member of the team's contribution by linking all communications and activities back to the contact and/or account.

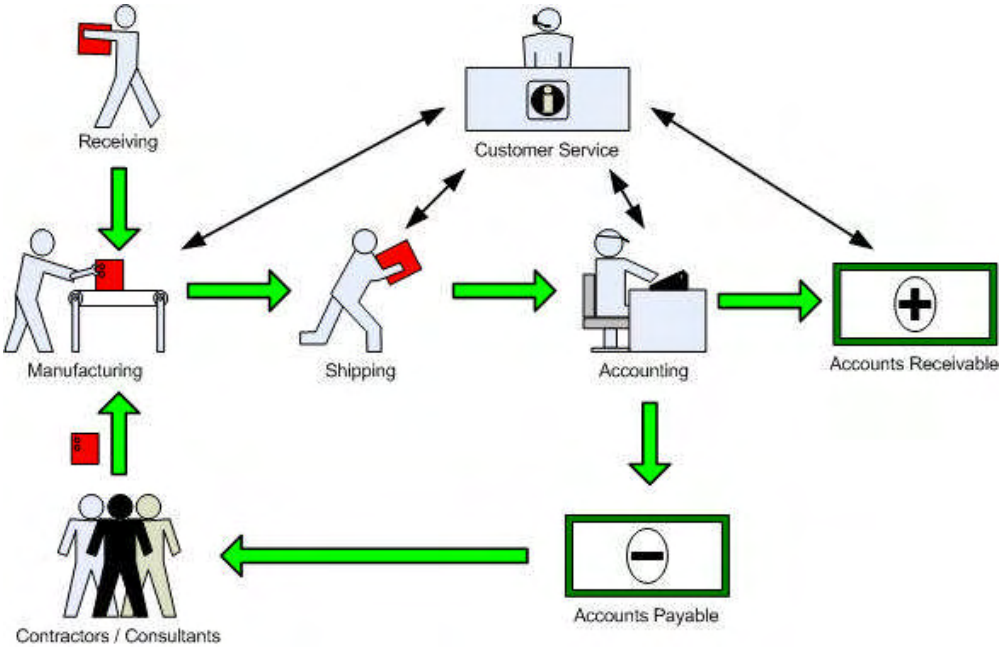
Business Process – Getting Business

RedHorse CRM is organized around the way business is conducted. This is the **Process** of business. Communication between many individuals makes that possible. The more organized those communications, the faster business can be conducted. In the graphic below, we simplify the multiple communications which occur in getting business.

Needless to say, the probability of getting a sale improves if the sales team knows more about the leads and prospects than the competition. By using RedHorse CRM, they have an advantage over their competitors.

Business Process – Delivering Business

Getting the order doesn't put money in the company's bank. There is a small matter of organizing and delivering the business. Those are important steps, but ultimately the company may have other challenges to get paid. Coordination and communication between many parties make it all possible.



RedHorse CRM is structured to reduce the communications challenges, and speed up the process of doing business.

What is RedHorse CRM?

RedHorse CRM is a highly configurable tool (Adjusts to any company's operating style) which revolves around the Contact Record and/or Account Record (your company's choice), enabling people in your company to interact effectively and efficiently with contacts and accounts. It allows them to schedule, automate, and track activities associated with each contact, and reduce their workload because so much of it is automated. Whether you work alone or with others, RedHorse CRM's flexibility and remote connection capability can keep you current with all your contacts, whether they are customers, prospects, or vendors. During a typical work day, you can use RedHorse CRM to:

- Quickly look up information about your contacts. RedHorse CRM associates all activity, sales, and correspondence with each contact, so you can retrieve all relevant information for an individual from one place.
- Schedule, track, and complete your activities, from 15-minute telephone calls to week-long events.
- Plan and record details associated with an individual sale or large-scale sales opportunities that require a team to complete. Managers can use RedHorse CRM to assign tasks and track completion.
- Send and retrieve email from your Internet email accounts, using the integration with Outlook or just the RedHorse CRM email system. You can also set up your own system to organize email in categories that work best for you.
- Print and email letters, memos, and other types of correspondence. You can use RedHorse CRM's filters and groups to target your mailings to the appropriate recipients, and work with customized templates to personalize correspondence.
- Manage the fulfillment of requests for printed literature, such as brochures and catalogs, to prospects and customers.
- Run reports, with a few mouse-clicks to extract information from the database. Create your own customized reports using SQL Reporting Services, and complex merge documents using Microsoft Word.
- Update your contact and calendar information by synchronizing RedHorse CRM with other devices, using its integration with Microsoft Outlook.

In short, all the tasks you have to do in your job anyway, just more easily.

If you are a typical small business, it takes several programs to do all this—but in one application RedHorse CRM allows you to manage work to a degree that is not possible when using a collection of separate programs.

The following sections show how you can work smarter using RedHorse CRM's key features every day to increase your efficiency.

Maintaining Contact & Account Information

You can use RedHorse CRM to store a huge amount of information about each prospect and customer, yet find a specific type of information quickly.

Because the program groups information under easy to understand tabs, you can find that information easily, once you are on the contact or account.

Each time you or any user in your company uses RedHorse CRM to add a contact to RedHorse CRM's database, a Contact Record is created. The Contact Record is the basic building block from which all other information is generated. As soon as the contact is created, other **Users** can find it as well (assuming they have permission).

Each Contact Record is like an individual index card and has all the standard information, such as name, company, phone, and address. However, the amount of detail you can store and track on each record is virtually unlimited. RedHorse CRM can be customized for your company by creating new fields for Contact Records, so there may be more fields on your screen to hold your company's special information, than we show in the manual. Because all information is stored in a SQL database, it is easy for multiple users to simultaneously view information without conflict.

One option in RedHorse CRM that is not available in other CRM systems is the ability for users (that's you) to create Account Records (Company Records) and link them to Contact Records. One Contact Record is the 'Primary' contact for the Account, but many Contact Records can be linked to an Account Record. Each Contact Record can only be linked to one Account Record. Those linked contacts are Main Contacts for the Account.

Managing Activities

Managing the three ring circus that is characteristic of some companies is a challenge because so many things occur so fast. Your company can bring order to chaos as you schedule, view, and complete activities in RedHorse CRM for yourself and your team members. Activities you schedule for a future date and time are stored as records in RedHorse CRM's Calendar. Reminders and alarms keep you up to date. Once calls are made, appointments kept, and messages received, the information transfers from the Calendar and the related contact's Pending tab to the History tab, where it is stored as a completed activity record.

Do you want to check your schedule for activities at an hour, on a particular day, week, or even a month? If you work with others on accounts, do you want to review all activities scheduled for one contact by all team members? You can view activities for users, user groups, for a particular date, or for a contact.

You can use the Calendar to view a variety of activities like appointments, calls, events or other activities. You can even review To-Do lists which have no scheduled time. On a less global scale, check the Pending tab on the Contact or Account Record to see what activities are ahead.

Each activity record, whether still pending on the Calendar or completed in the history tab, is directly linked to a specific Contact or Account Record. Connecting activities to contacts establishes a relational link that you can use to track the progress of each customer relationship.

Communicating with Others

RedHorse CRM can help reduce the challenges of communicating—record the critical details of phone conversations, print correspondence, send email, and distribute literature. RedHorse CRM integrates the functionality of your word processor and email software to communicate with contacts and coworkers.

Email

You can use RedHorse CRM to send, retrieve, and manage your Internet email. The email you use can be Microsoft Outlook, integrated into RedHorse CRM, or the native RedHorse CRM email. Use an HTML style sheet for a more professional look.

Printing and Scanning

RedHorse CRM works in conjunction with Microsoft Word so you can merge contact information from RedHorse CRM into templates, generating personalized correspondence. RedHorse CRM's Document Management settings provide a central location where you can access and manage your correspondence.

Distributing Literature, etc.

Companies can manage requests for printed material, such as brochures and price lists, or any complicated series of actions which must be coordinated, using RedHorse CRM's Workflow.

Analyzing and Reporting

RedHorse CRM can give you reports on any data contained in the RedHorse database, whether native or imported. RedHorse CRM is integrated with the powerful SQL Reporting Services tool to allow your company to analyze and report on anything in the RedHorse database. Of course, someone will have to decide what to analyze, and how it should be formatted in a report, probably someone in your Administrator's office. If you are not seeing what you need to do your job, you may want to check with the Administrator to see if they can make the report available to you.

Automating Routine Tasks

Some activities are so repetitive, and mind-numbing that they occasionally get overlooked. Make sure the routine tasks get done properly by streamlining your work using Workflow, making RedHorse CRM a reliable assistant and freeing you from dull, time-consuming tasks. This is another area that the Administrator can quickly set up for you, but you (the workers) will have to tell them what it is you need.

Automated Processes (Workflow)

Some of the more important activities which can benefit by using Workflow are shown below. Your Administrator can set up RedHorse CRM to perform repetitive tasks which you see in medium- and long-length sales cycles, including:

- Quotation stages and follow up
- Lost business follow up
- Administrative and tracking duties
- Generating direct mail
- Validating data
- Service cycles
- Post-sale activities

The details of each of the above would be a series of predefined actions that occur when there is a change in status (for example changing from Suspect to Prospect, or from Quotation to Order). The actions can be as simple as sending a single email or as complex as executing a process on all contacts or groups of contacts in the database. For example, using Workflow you can send a follow up email to a Contact a prescribed number of days after the quote is sent. After sending the quote, Workflow can automatically schedule both the email and a follow-up call on the calendar of the specified RedHorse CRM User(s).

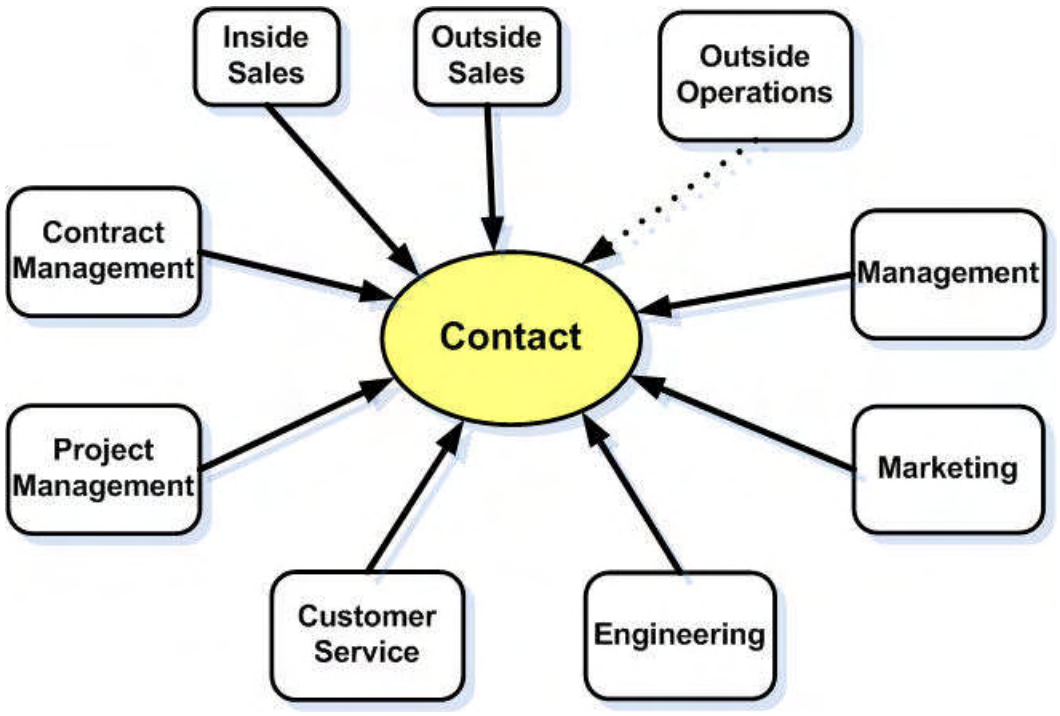
The Enormity of It All

Yes, there are a lot of sections and details in the manual. Do you need ALL of it? No.

Like many programs you use, you will only need a small portion of it to do your job. Its just . . . which portion? To find out which are useful to you, we suggest you try each one that we describe, and is enabled in your installation. Some will be of great help, while others may never be used. Simply knowing what is available to you may be enough.

If you don't have time to go completely through the manual, we suggest you read and try out on your system the basic navigation elements of the next section, and then use the Table of Contents and the Index to find anything else you need.

Who Should Be Using RedHorse CRM?



Dotted Line indicates Remote Desktop Connection.

How RedHorse CRM Works

Overview

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Launching RedHorse CRM

You can start RedHorse CRM from either the Windows' Desktop or Taskbar:

- From the desktop, double-click the RedHorse CRM icon.
- From the Microsoft Windows taskbar, click **Start** and select **Programs>>RedHorse Systems>>RedHorse CRM**.

The **RedHorse CRM logon** window appears.

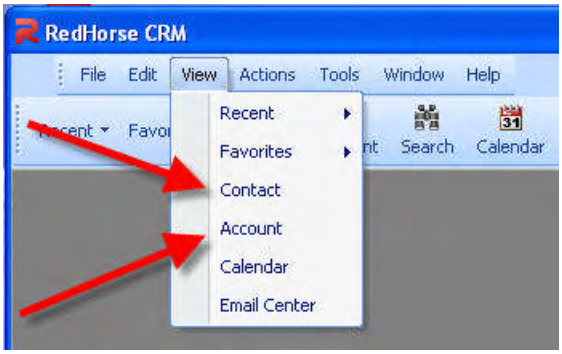
Type your **Username** and **Password**, then click **OK**. Username is not case sensitive, Password is.

Note: Most of the RedHorse controls follow conventional use. Sliders work the same way as many other programs. Left and right arrow-type icons will move the information displayed in a left-right fashion. Drop-down menus work the same way as you have seen in other programs. Action buttons take the action they describe. Right-clicking in an area will often reveal the local menu, as is true of other programs. As a convention, when we say **click** the mouse, we mean left-click. We will specifically say right-click if that is what is needed. Windows can be resized by grabbing the edges, and dragging them to the size you want.

Oh! Just to keep you on your toes, we should mention that some of the text next to the fields may be different than the field names. Go blame your Administrator if that is so. They control what things are called.

There's Nothing Here!!!

If this is the first time you have opened the program, it has no idea what you want to see, so you have to set it by selecting **View** from the main menu (just below the RedHorse CRM title bar). We choose **Contact** and **Account** for this example. For the record, there are at least two ways to get to any part of the program, and usually more.



For instance, clicking on the Contact or Account icons on the line below the main menu, at right, will do the same. Of course, your Administrator would have to have turned them on!

Important Terms

Two terms are used extensively, but there are four (4) meanings:

Group – A User who signs in, is part of a User Group
A collection of Contacts can be a Contact Group

Tab - In the top half of the window, clicking on a Toolbar icon creates a Window Tab.
In the bottom half of the window, there are Record Tabs.

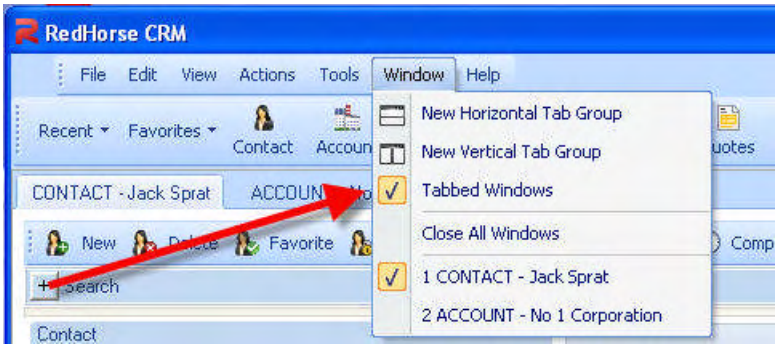
We try to minimize confusion as we describe the program, but know that uncertainty hovers around every description. When you see these words, please try to read carefully to be sure which one we are discussing.

Tabbed Windows Simplifies Explanations

To help minimize confusion as we explain RedHorse CRM, we ask you to put it into **Tabbed Windows** mode. That way, our explanations will track what you see on your screen. Getting out of that mode is as easy as getting in . . .

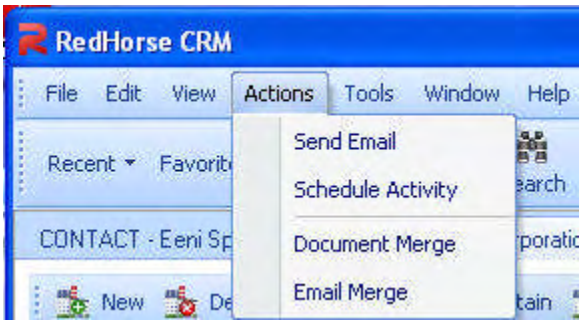
Setting Tabbed Windows

Go to the Main Menu Bar, just below the RedHorse CRM Title Bar to **Window** and click it. When the menu drops down, **Tabbed Windows** will be there. Click it. To get out of Tabbed Windows, follow the same order of actions. By clicking an already-selected Tabbed Windows, you deselect it. Individual window mode will then begin.



With luck, as you first read this manual you will also see on your screen a RedHorse CRM with few customizations. Not that we discourage customizations, just the opposite, we think they make this a program more suitable for many companies – but not when we are trying to explain how to use the program. You could get very frustrated if nothing in this manual looks like your screen.

Menu Bar – Actions

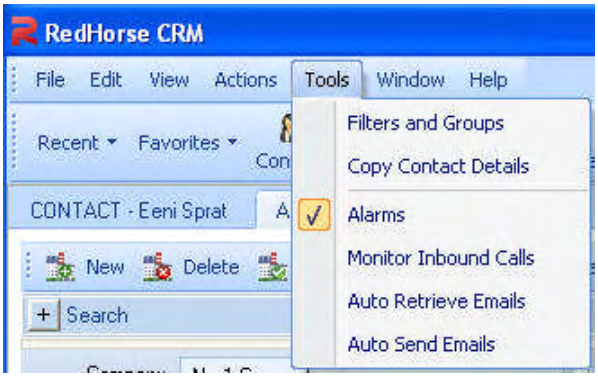


Clicking on the Actions menu item will give you a drop-down menu like the one at left. Notice the grey bar separating it into a top and bottom section. It isn't there just for decoration.

The items above the bar are specific, meaning they are not linked to the active Contact or Account, but are intended for a single recipient or User. When the action window opens, it is empty of data.

The items below the bar can be used with a single recipient, but their true utility is with a larger audience (groups). When these action windows open, data fields already have the active contact's information, but Groups and Merge Codes are readily available.

Menu Bar – Tools



Again a grey bar! Above it are immediate actions. Clicking on **Filters and Groups** will give you the window to establish both. **Copy Contact Details** will put all of the active contact's details on the clipboard. Pasting the clipboard contents in a word processing document will reveal all the contact information the database has: company name, contact's name, address, email and phone numbers.

Below the gray bar are settings. Clicking on the item will select or deselect (if it is already selected). **Alarms** are useful to alert you of things to do. **Monitor Inbound Calls** works only if the phone system is integrated with RedHorse CRM. The email settings change from the manual email setting to **Auto**. Add new screenshot w scanning TGD

RedHorse CRM
User's Manual

A step-by-step guide for first-time, and experienced computer Users

RedHorse CRM is very powerful software, but this guide shows where controls are located and how to operate them so that basic computer Users can find what they need and be functional in a very short time.

Who needs this manual? First time Users of RedHorse CRM and experienced Users trying to remember how to access infrequently-used features. The manual is both a primer and a reference.

The task of learning how to use new software can be daunting, but RedHorse CRM uses controls which are similar to those contained in other software, and will look familiar. Tasks are grouped together in ways which make sense to those doing the tasks. But even the most well thought-out CRM software will be more than an 'Intuitive' design can manage. There is simply too much to cover. Hence, the need for this manual. It will speed the new User's understanding of what the software is, and what it can do.

The Manual at a Glance:

- Table of Contents – a listing of contents, showing where to find them
- CRM Overview – an explanation how software modules relate to your work
- How CRM Works – where to find, and how to use, the main features
- Managing Records – where important information is stored, and basic access to it
- Searching Records – using the system to quickly find the exact information you want
- Organizing Contact Records – options to simplify record keeping
- Scheduling Activities – simple steps to scheduling your work, and others
- Email – turning this basic task into a powerful tool to reduce your workload
- Printing – using document and report templates, as well as printing options
- Quoting – using pre-defined templates to turn quoting into an easy task
- Dashboards – an easy way to see how you are doing
- Teamwork – a few mouse clicks to include other team members
- Glossary – A list of all those strange technical words, and their meanings
- Index – An alphabetical listing of topics contained in the manual

What the manual will not cover Each company which installs RedHorse CRM has the option to change the look, feel, and operation of the software to suit their business. The Manual can prepare the new User to expect such changes, but cannot explain customized features, because there are so many ways to change how it works.

Easy Ordering

Every RedHorse CRM user will want their own printed copy to help them learn how to use the program, and to make notes to guide them through their company's customization of the program.
Order the $39.95 printed manual online: RedHorse CRM User's Manual Ordering
Or call and order at: (503) 206-0333